# User Guide

Generated on 16 May 2026, 13:21

Welcome to the Project Management platform. This guide walks you through everything you need to know as a team member to log your time, manage your tasks, and stay on top of your work.

## Table of Contents



## 1. Getting Started

### How to Log In

1. Open the application URL in your browser.
2. Enter your **email** and **password**.
3. Click **Login**.

If you have forgotten your password, click **Forgot Your Password?** on the login page. Enter your email address, then choose a new password on the next screen and log in with it. No administrator involvement is required.

### Navigating the App

After logging in, you will see the **Dashboard**. The left sidebar has your main navigation:

- **Dashboard** — Your overview page
- **My Timesheet** — Log and view your time entries
- **My Tasks** — View and manage your assigned tasks
- **My Projects** — See the projects you are part of

## 2. Dashboard

The Dashboard gives you a quick overview of your current work.

### My Tasks Widget

Shows your top 5 active tasks sorted by due date with status counts (To Do, In Progress, Review).

### My Timesheet Widget

Shows your current week's time summary: total hours logged, target hours, progress percentage, and a daily breakdown (Monday to Sunday).

### Upcoming Deadlines Widget

Lists tasks with due dates coming up in the next 7 days and any overdue tasks.

### Team Availability Widget

Shows which team members are on vacation, sick leave, or otherwise unavailable in the current and upcoming 7 days.

## 3. Profile

### How to Edit Your Profile

1. Click your name in the top-right corner of the page.
2. Select **Profile**.
3. Update your first name, last name, or phone number.
4. Click **Update Profile** to save.

### How to Change Your Password

1. Go to your Profile page.
2. In the **Change Password** section, enter your current password.
3. Enter your new password and confirm it.
4. Click **Update Password**.

### How to Reset a Forgotten Password

*Use this if you cannot log in. If you can already log in and just want to update your password, use How to Change Your Password above.*

1. On the login page, click **Forgot Your Password?**
2. Enter your email address and click **Continue**.
3. On the next screen, enter your new password and confirm it. Minimum 8 characters with uppercase, lowercase, number, and symbol.
4. Click **Reset Password**.
5. You'll be returned to the login page. Sign in with your email and the new password.

The reset is self-service — no administrator approval is required. Inactive accounts cannot be reset; contact your administrator if your account has been deactivated.

### How to Manage Your Skills

1. Go to your Profile page.
2. In the **Skills** section, enter your skills separated by commas.
3. Click **Update Skills**. You can add up to 20 skills, each up to 50 characters.

### How to Set Availability / Vacation

1. Go to your Profile page.

2. In the **Availability Overrides** section, click **Add Override**.
3. Select the type: Vacation, Sick Leave, Holiday, or Other.
4. Set the start date, end date, and hours per day (0 = fully unavailable).
5. Click **Save**.

## 4. Timesheet

**Location:** My Work > My Timesheet

### How to Log Time

1. Go to **My Timesheet**.
2. Select a **Project** from the dropdown.
3. Select a **Task** from the tasks dropdown.
4. Click on the day cell where you want to log time.
5. Enter the duration (in hours, e.g., 2.5).
6. Optionally add a description.
7. Choose whether the time is billable or not.
8. Click **Save**.

### How to Quick-Create a Task

Click the **Quick Task** button next to the task dropdown, enter a task name, and the task will be created immediately.

### Editing / Deleting Your Time Entries

You can edit or delete any of your own time entries at any time. The only exception is an **invoiced** entry, which is permanently locked and cannot be modified.

### Closed Task Restriction

You cannot log time against a task that has been marked **Done** or **Cancelled**. Ask your project manager to reopen it, or ask them to log the time on your behalf (managers and admins can log time on closed tasks).

### Duration Format

Durations are entered and displayed in a human-readable `H.MMh` style (e.g., `2.30h` = 2 hours 30 minutes). You can also type `1:30` colon format and the app will convert it automatically. A live preview shows the resolved duration as you type.

## 5. My Tasks

**Location:** My Work > My Tasks

### Task Views

- **Table View** — A list with columns for name, project, status, priority, due date. Supports search and filters.
- **Board View** — Kanban-style cards grouped by task list columns.
- **Grouped View** — Tasks grouped by project.

### How to Update Task Status

1. Find the task in any view.
2. Click the status toggle/button on the task.
3. Select the new status (To Do, In Progress, Review, Done).

On **client projects**, marking a task as "Done" creates a closure request instead of closing it directly. Your project manager will review and approve the closure.

### How to Add Comments

Open the task detail view, scroll to the Comments section, type your comment and click Post.

### How to Upload Attachments

Open the task detail view, scroll to the Attachments section, click Upload and select a file.

## 6. My Projects

**Location:** My Work > My Projects

The projects page shows all projects you are assigned to. Click a project to see its detail page with project information, your assigned tasks, team members, and project timeline.

## 7. Notifications

Click the **bell icon** in the top navigation bar to see your notifications.

| Notification | What It Means |
| --- | --- |
| **Task Assignment** | You have been assigned to a new task. |
| **Task Closure Approved** | Your closure request was approved. |
| **Due Date Reminder** | A task is due within the next 7 days. |
| **Workload Alert** | Your workload has exceeded capacity. |
| **Approval Reviewed** | An approval request was approved or declined. |

## 7a. Feedback

**Location:** Help > Feedback (sidebar) or the **Feedback** button at the top of the Help page.

Use the feedback form to report a bug, request a feature, raise a UI issue, or send general feedback. Your submission lands in the admin inbox; admins close it with a resolution message and (when relevant) updated screenshots that you can see on your detail page.

- Pick a **Type**: Feedback, Feature Request, Bug Report, or UI Issue. Bug Report and UI Issue also require a **Severity**.
- Your **Name** and **Email** are pre-filled from your account but editable.
- **Page URL is required** — paste the address of the page your feedback is about (copy from your browser's address bar). The form will not submit without it.
- Attach up to **5 files** (5 MB each). Allowed: PNG, JPG, GIF, WebP, PDF, TXT, LOG.

The **My Feedback** page lists everything you've submitted. Filter by **Open** or **Closed**. When admins close your submission, you receive an in-app notification.

## 8. Tips & FAQ

### What happens if I log time past midnight?

The system automatically splits the entry into two separate entries — one for each day.

### What are recurring tasks?

Some tasks repeat automatically on a schedule. New instances appear in your My Tasks list automatically.

### What is the difference between Internal and Client projects?

**Internal** projects are for your organization's own work. **Client** projects are for external clients and may have additional rules like the task closure approval workflow.

### What do task priorities mean?

| Priority | Meaning |
| --- | --- |
| **Critical** | Highest urgency — address immediately. |
| **High** | Important — should be completed soon. |
| **Medium** | Normal priority — standard work. |
| **Low** | Can be done when time permits. |

### What do task types mean?

| Type | Meaning |
| --- | --- |
| **Story** | A user story or feature request. |
| **Task** | A general piece of work. |
| **Bug** | A defect or issue to fix. |
| **Subtask** | A smaller task that is part of a larger parent task. |